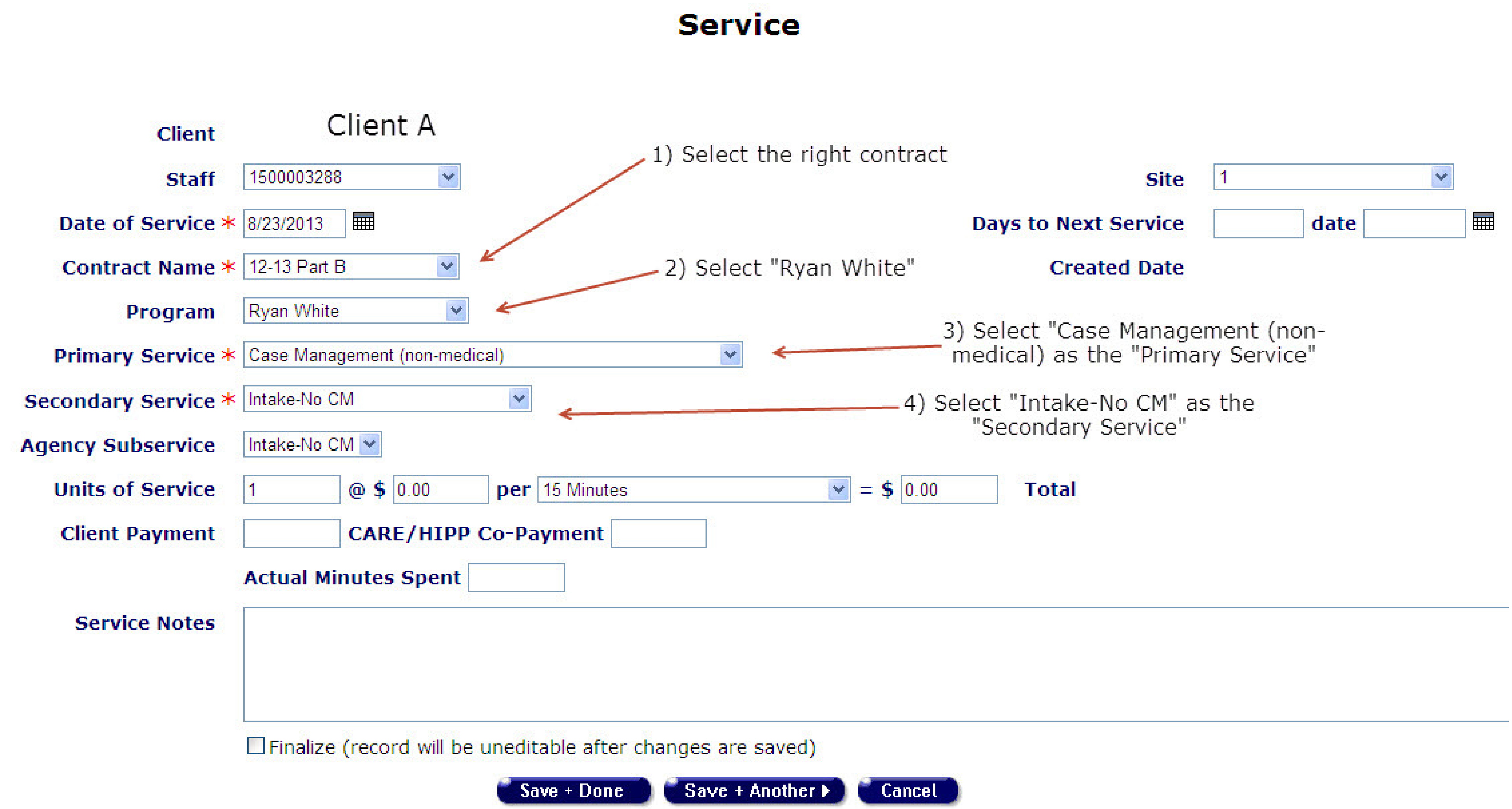
Client A – No CM Indicated

1) Enter a UOS of “Case Management (non-medical)” > “Intake – No CM”. In this example, we only entered 1 UOS, but you should enter the amount of time that appropriately reflects the amount of time spent with the client.



Service

Client: Client A

Staff: 1500003288

Site: 1

Date of Service *: 8/23/2013

Days to Next Service: date

Contract Name *: 12-13 Part B

Created Date

Program: Ryan White

Primary Service *: Case Management (non-medical)

Secondary Service *: Intake-No CM

Agency Subservice: Intake-No CM

Units of Service: 1 @ $ 0.00 per 15 Minutes = $ 0.00 Total

Client Payment: CARE/HIPP Co-Payment

Actual Minutes Spent

Service Notes

Finalize (record will be uneditable after changes are saved)

Save + Done | Save + Another | Cancel

1) Select the right contract

2) Select "Ryan White"

3) Select "Case Management (non-medical) as the "Primary Service"

4) Select "Intake-No CM" as the "Secondary Service"

2) Enter a progress note summarizing the client session and explaining why the client does not have a need for case management.

Client A **Case Notes**

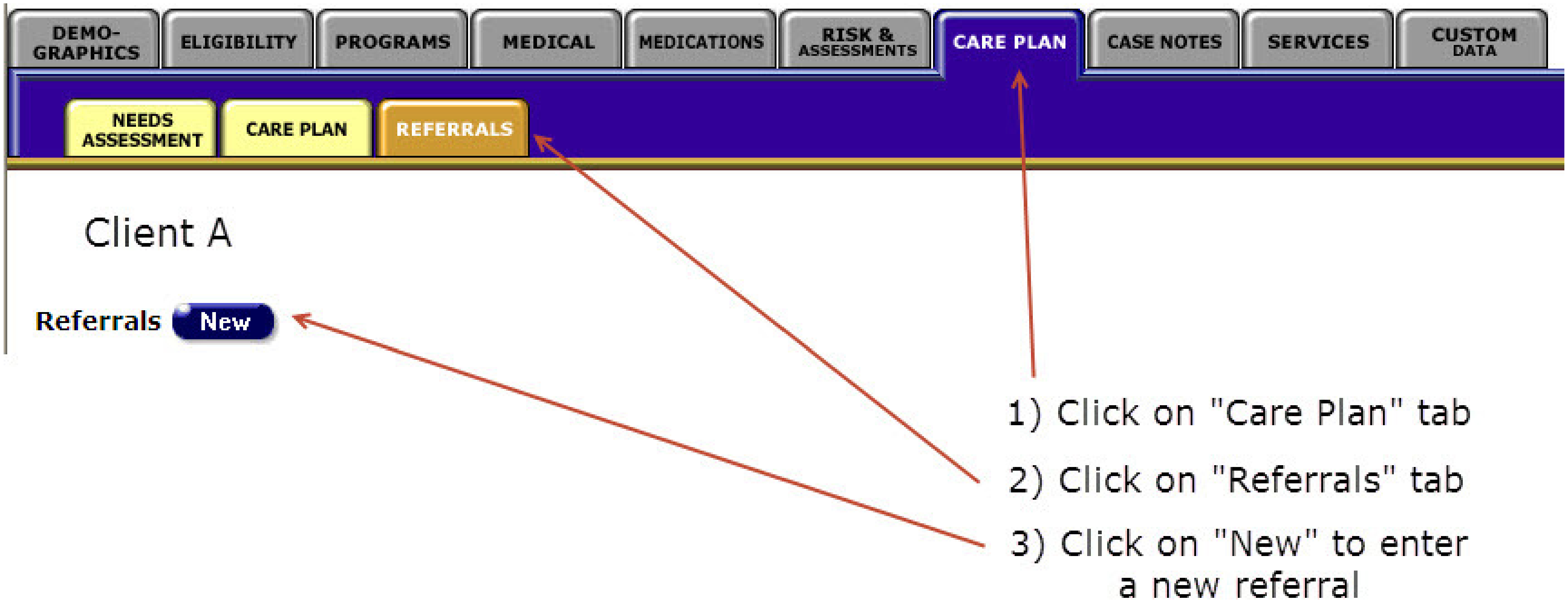
StaffID	1500003288	**Created**	8/23/2013
Type	Assessment/Reassessment	**Activity Date**	8/23/2013

Category Impressions **175 characters (max 7,750)** ☐ **Don't share**

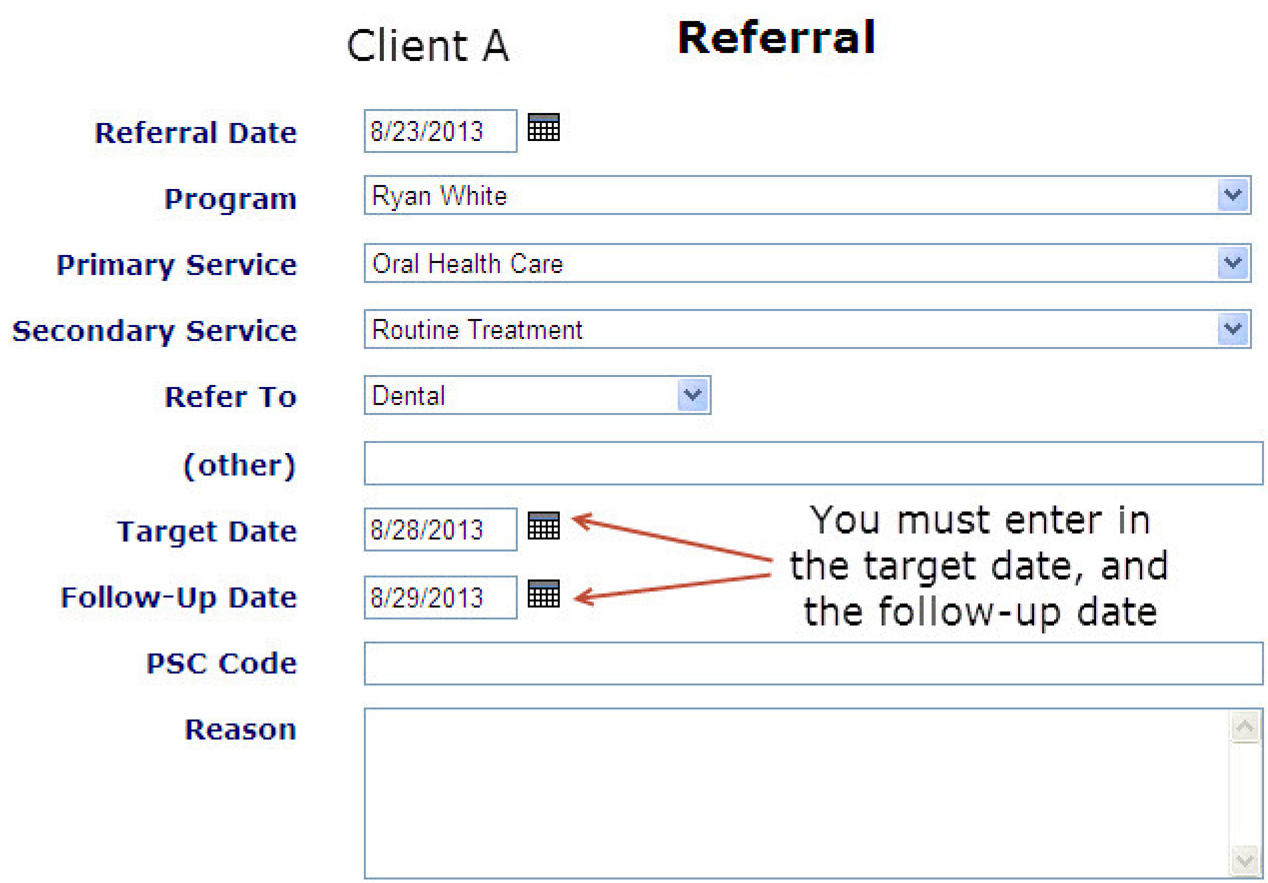
New Paragraph

This is where you summarize the session and explain why the client DOES NOT need case management, and what other assistance needs they client has

3) Find the referrals tab (under “Care Plan”) in order to enter in the referral information

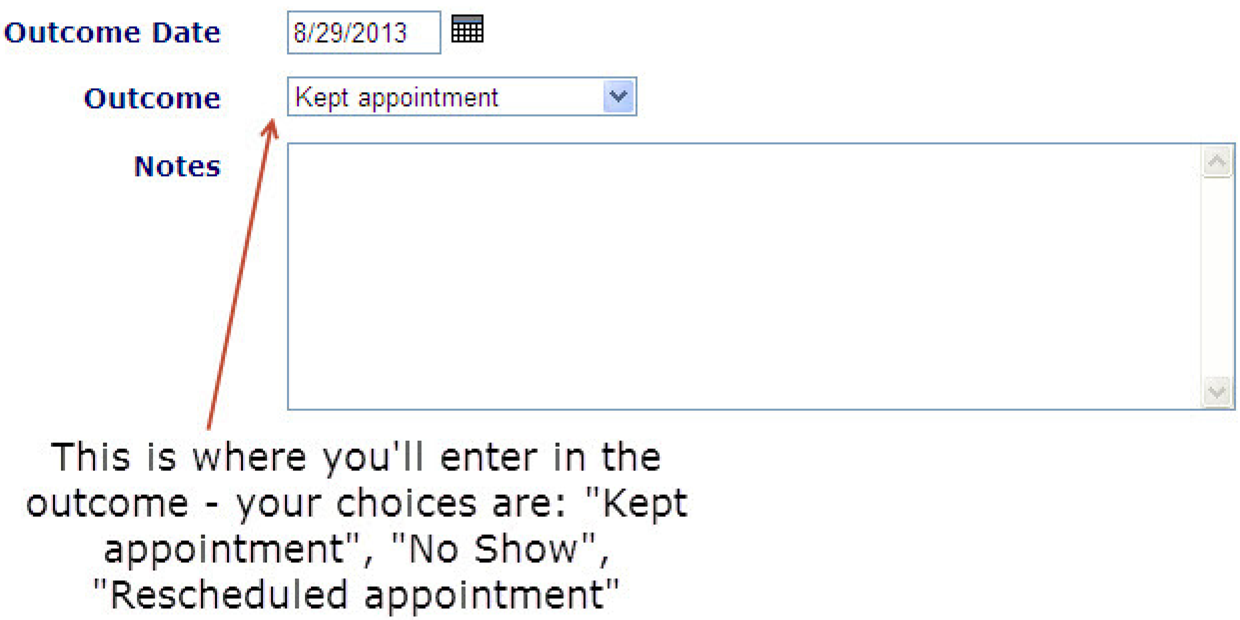


Once you are in the referral screen, enter in the correct referral information including the expected target and follow-up dates

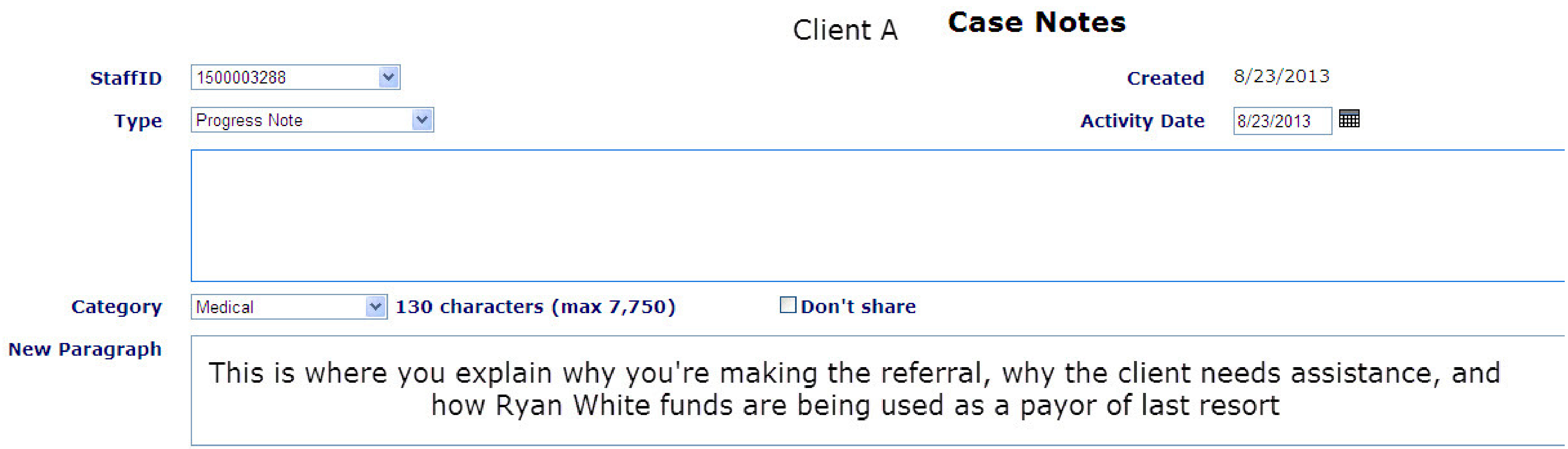


After you've saved the referral, it'll return you back to the main referral screen which will look like this:

Finally, following the appointment, go back into the referral screen, click the "Edit" button under "Outcome" and enter in the outcome of the referral



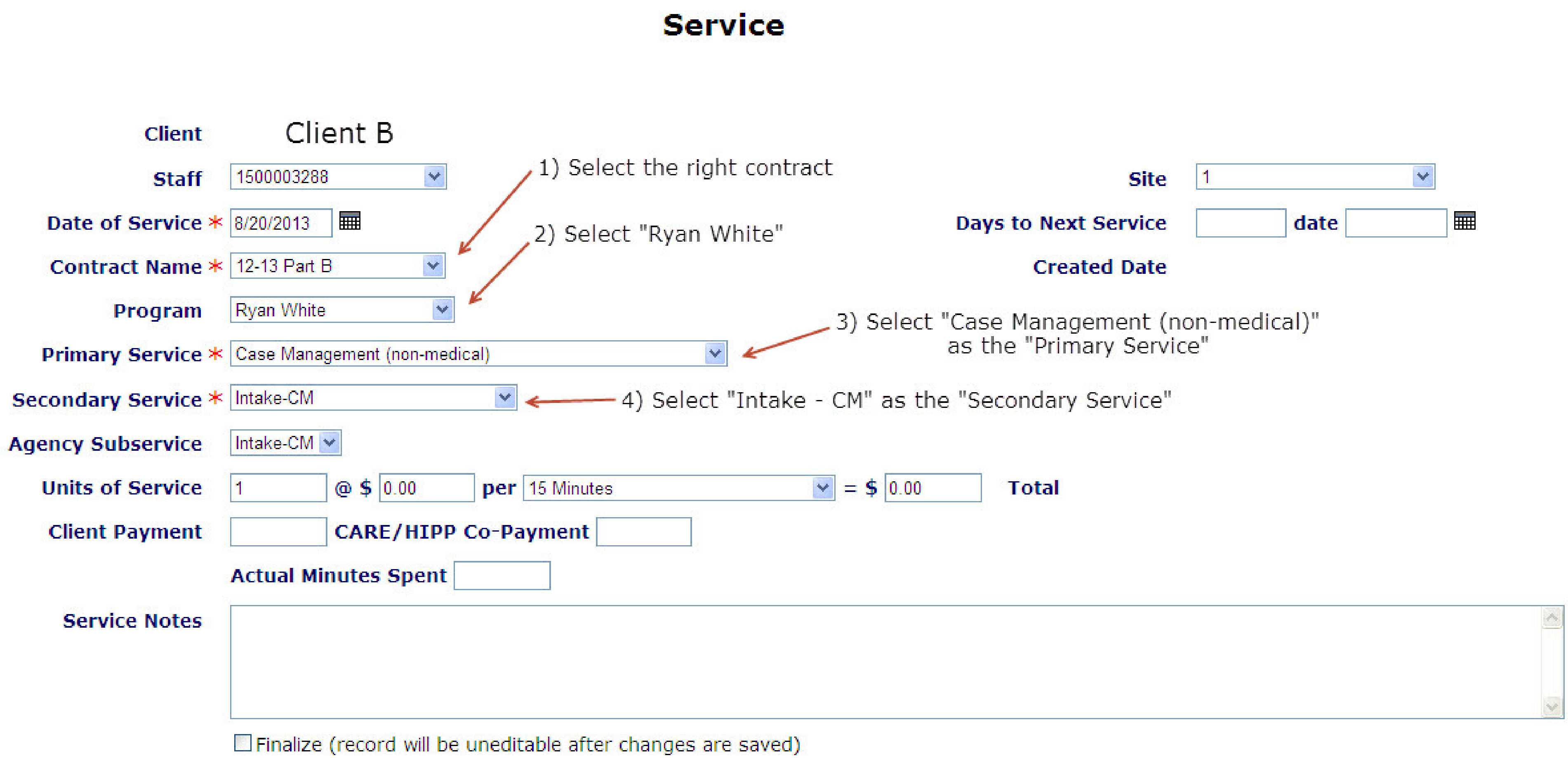
4) Finally, enter a progress note explaining the referral made, and how Ryan White funds are being used as a payor of last resort.


Client A **Case Notes**

StaffID	1500003288	**Created**	8/23/2013
Type	Progress Note	**Activity Date**	8/23/2013
Category	Medical **130 characters (max 7,750)**	☐ **Don't share**	
New Paragraph	This is where you explain why you're making the referral, why the client needs assistance, and how Ryan White funds are being used as a payor of last resort		

Client B – CM Indicated

1) Enter a UOS of “Case Management (non-medical)” > “Intake – CM”. In this example we only entered 1 UOS, but you should enter the amount of time that appropriately reflects the amount of time spent with the client.



Service

Client: Client B

Staff: 1500003288

Site: 1

1) Select the right contract

Date of Service *: 8/20/2013

Days to Next Service: ___ date ___

2) Select "Ryan White"

Contract Name *: 12-13 Part B

Created Date

Program: Ryan White

Primary Service *: Case Management (non-medical)

3) Select "Case Management (non-medical)" as the "Primary Service"

Secondary Service *: Intake-CM

4) Select "Intake - CM" as the "Secondary Service"

Agency Subservice: Intake-CM

Units of Service: 1 @ $ 0.00 per 15 Minutes = $ 0.00 Total

Client Payment: ___ CARE/HIPP Co-Payment: ___

Actual Minutes Spent: ___

Service Notes:

Finalize (record will be uneditable after changes are saved)

2) Enter a progress note summarizing the client session and explaining why the client has a need for case management.

Client B **Case Notes**

StaffID 1500003288 **Created** 8/22/2013

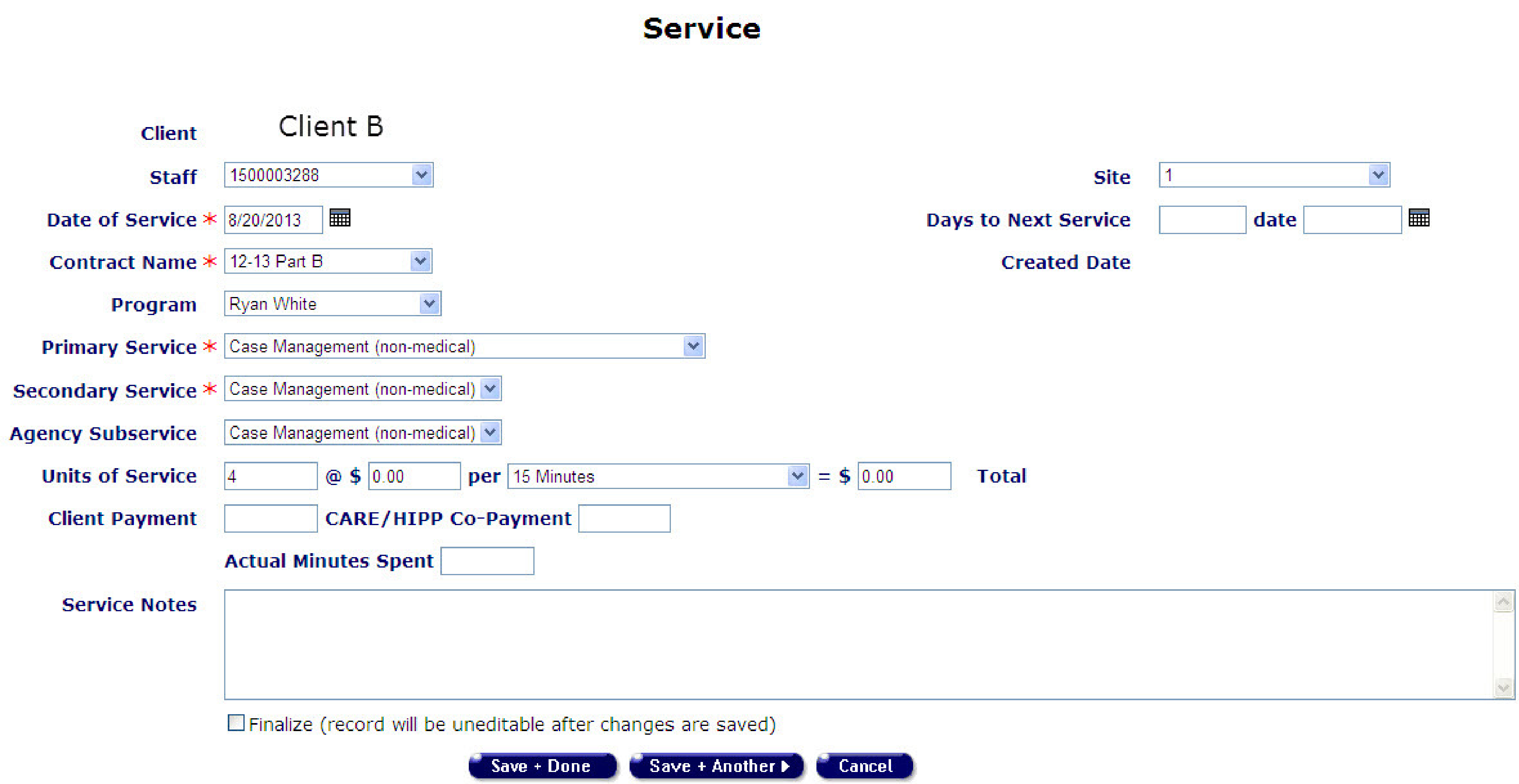
Type Assessment/Reassessment **Activity Date** 8/22/2013

Category Impressions **110 characters (max 7,750)** ☐ **Don't share**

New Paragraph

This is where you summarize the session and explain why the client has a need for case management

3) After completing part of the assessment, you enter in the appropriate UOS of CM for the session.



Service

Client Client B

Staff 1500003288

Site 1

Date of Service * 8/20/2013

Days to Next Service **date**

Contract Name * 12-13 Part B

Created Date

Program Ryan White

Primary Service * Case Management (non-medical)

Secondary Service * Case Management (non-medical)

Agency Subservice Case Management (non-medical)

Units of Service 4 **@ $** 0.00 **per** 15 Minutes = **$** 0.00 **Total**

Client Payment **CARE/HIPP Co-Payment**

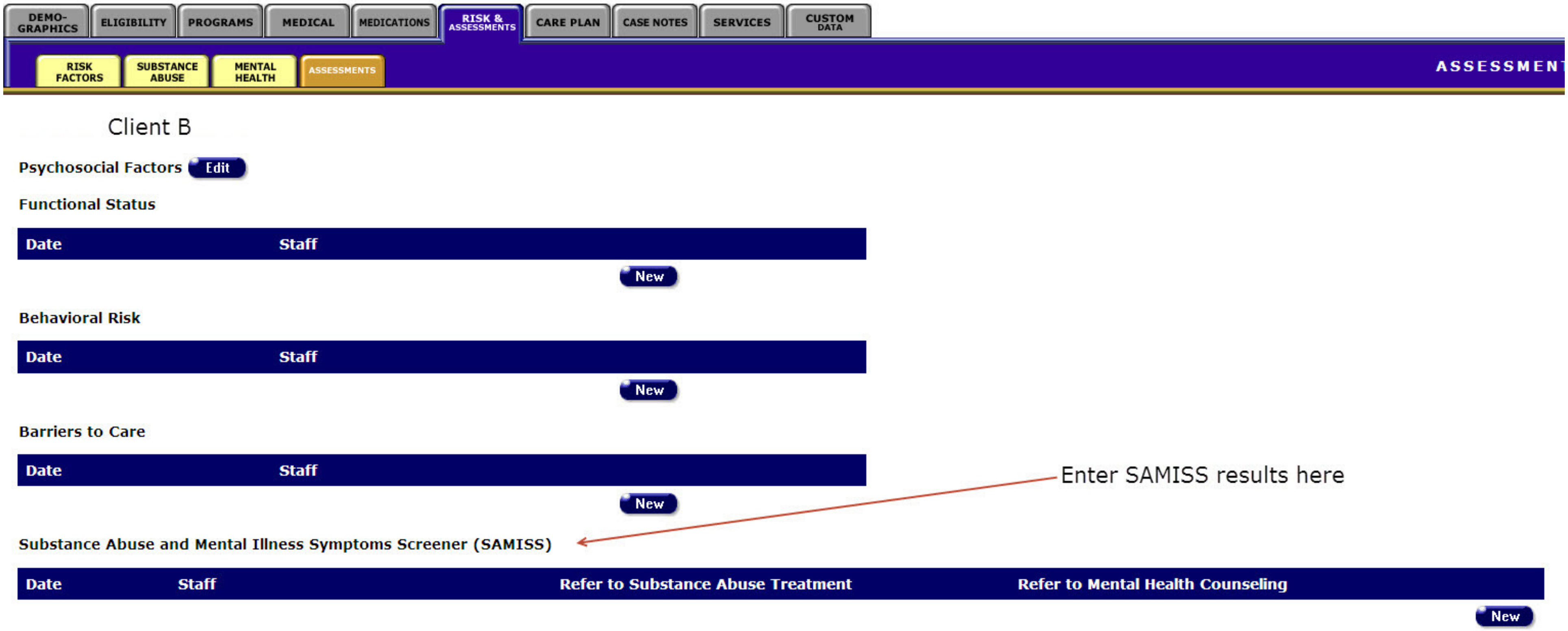
Actual Minutes Spent

Service Notes

☐ Finalize (record will be uneditable after changes are saved)

Save + Done | Save + Another | Cancel

4) Since you were able to complete the SAMISS during the session, you also enter that information under the risks and assessments tab.



5) Finally, you enter in a progress note detailing the assessment portion of the session and details about the planned follow-up session.